TMBills User Manual

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TMBills User Manual

Easy, complete time and billing for Time Matters®

by Wells H. Anderson, J.D., CIC

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1 Intro and Quick Start

1.1 What Is TMBills?

TMBills links Time Matters® practice management software with RTG Bills timekeeping and billing software.

TMBills bundles RTG Bills software, giving you an easy, complete billing system.

TMBills is an alternative to Billing Matters®, PCLaw®, Timeslips®, and Tabs3.

With TMBills, you enter clients, matters and time and expense records **in Time Matters**, just as you would with Billing Matters. You have all the time-saving advantages of entering and changing information in one place, Time Matters. The information is linked to your billing system so you don't have to enter it twice.

By using TMBills you:
- Capture more billing time, so profits increase
- Reduce your annual software costs significantly
- Save time by entering and updating client information in one place: Time Matters
- Synchronize client names addresses from Time Matters to RTG Bills
- Optionally create billing records in Time Matters and send them to RTG Bills
- Reduce the boredom and inefficiency of repetitive manual tasks

RTG Bills handles Accounts Receivable and Trust Accounts, but is not a full accounting package.

QuickBooks transactions may be imported into RTG Bills as long as valid Matter numbers are entered in the Memo field.

TMBills is a product of Active Practice LLC designed specifically for small firms and solo practitioners who use Time Matters.

1.2 Features

Software

- ❑ Designed specifically for law offices
- ❑ Easy to learn and use
- ❑ Highly stable
- ❑ Affordable
- ❑ Includes RTG Bills time and billing program

Synchronization Features

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- Synchronize clients and matters from Time Matters to RTG Bills
- Send Billing Records from Time Matters to RTG Bills
- Optional: Enter Billing records on notebooks and mobile devices
- Import QuickBooks transaction into RTG Bills

Billing Features

- Hourly billing
- Flat fee billing
- Contingent fee billing
- Customizable bill formats
- Letterhead designs
- Send PDF bills via e-mail
- Receive payments via PayPal link in PDF bills
- Option: Enter time records remotely via Web browser / mobile phone
- Long, long list of available reports
- Much more...

1.3 Quick Start Video

To view the Quick Start Video, click here:
http://www.activepractice.com/storage/products/tmbills/TMBills-Intro.wmv

The video may be opened and viewed directly or may be downloaded, saved and viewed from your MS Windows computer.

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1.4 Edition Notice

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2 Installation and Setup

2.1 Requirements

TMBills works with:
- Time Matters 11
- Time Matters 10 and Practice Advantage 10
- Time Matters / Billing Matters 10 and 11, allowing you to transition from Billing Matters to TMBills
- Microsoft Windows XP, Vista, Windows 7, Windows Server, Windows Small Business Server
- Windows Small Business Server
- Computers running MS Windows, including Apple computers running MS Windows on Boot Camp or virtual machine software.
- RTG Bills 2.23 and 2.24

2.2 Installation on Server

Installing the Program File

Download the setup file using the link you received when purchasing TMBills.
Call Active Practice Technical Support at: 800.575.0007 to schedule installation.

Custom Installation Required

Because TMBills integrates with Time Matters, custom installation by the TMBills support team is necessary.

Time Matters is highly customizable. TMBills takes advantage of the power available in Time Matters and needs to be tailored so that it does not conflict with existing user customizations.

2.3 Installation on Workstations

Installation on each workstation has two steps:
1. Install TMBills with `setuptmb.exe`
2. Install RTG Bills with `bills.exe`

These files are found in the **TMBills folder** on the server or main computer.

The consultant who installs TMBills gives you the name of the TMBills folder.

The TMBills folder is found in the Time Matters Shared Files Folder, for example:
\\Server\Docs\TMBills or
M:\Clients\TMBills

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You **need to have** the name of the **RTG Bills folder** when your are installing RTG Bills on a workstation.

The RTG Bills folder is inside the TMBills folder, for example:
\\Server\Docs\TMBills\RTG Bills or
M:\Clients\TMBills\RTG Bills

You also need the **License Key** for RTG Bills, provided by your consultant. It looks like: DCBA-ZYXW-NMLK

Installing TMBills on Workstation

To install TMBills:
1. Open Windows Explorer (Hold down the Windows key between Ctrl and Alt and press the letter E).
2. Open the TMBills folder. It is in the Time Matters Shared Files Folder, for example, \\Server\Docs\TMBills
3. Double-click on `setuptmb.exe`
4. Click [Run] in the window: Open File - Security Warning
5. Click [Close] in the Success! window.

Note: Norton Internet Security and other antivirus programs may display a warning when you run `setuptmb.exe`. Norton Internet Security can display a Sonar window in the lower right corner.
If the **Sonar** window appears:
1. Click on Details in the Sonar window.
2. Click on Restore.
3. Click [Yes]. Click [Close].

Installing RTG Bills on Workstation

To install RTG Bills:
1. Open Windows Explorer (Hold down the Windows key between Ctrl and Alt and press the letter E).
2. Open the TMBills folder. It is in the Time Matters Shared Files Folder, for example, \\Server\Docs\TMBills
3. Double-click on `bills.exe`
6. Proceed through the installation screens, accepting the following settings.
7. Accept the default program folder.

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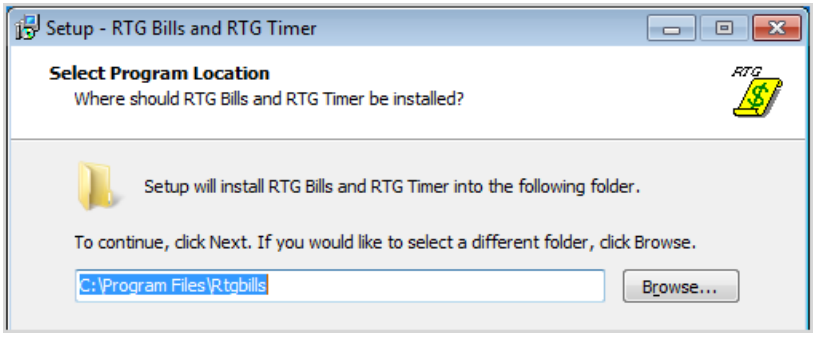
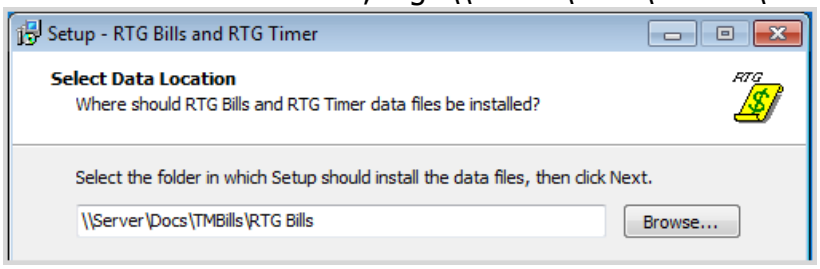
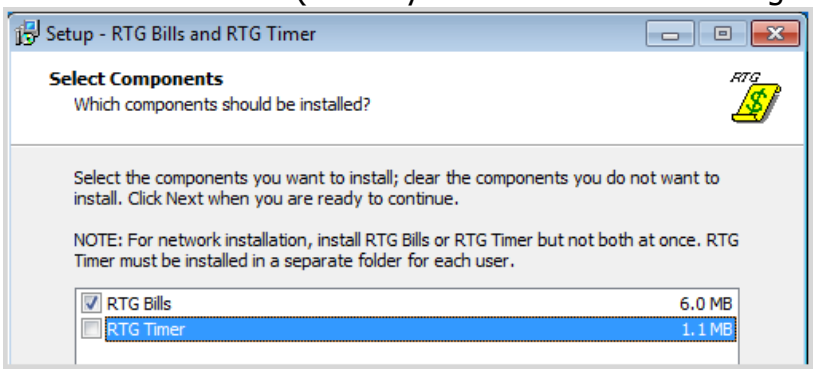

Setup - RTG Bills and RTG Timer
Select Program Location
Where should RTG Bills and RTG Timer be installed?
Setup will install RTG Bills and RTG Timer into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files\Rtgbills
Browse...

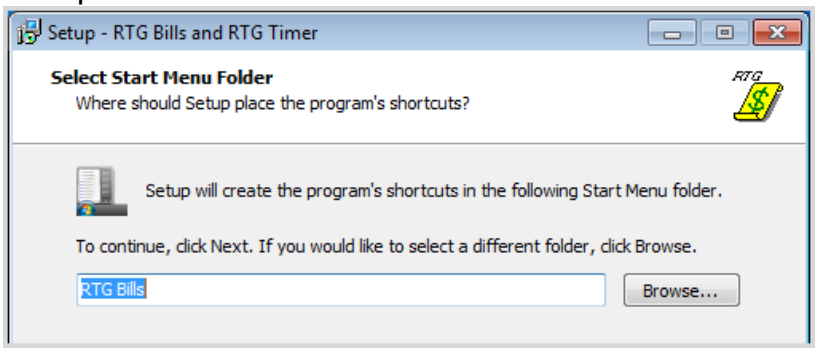
8. Enter the RTG data folder, e.g. \\Server\Docs\TMBills\RTG Bills


Setup - RTG Bills and RTG Timer
Select Data Location
Where should RTG Bills and RTG Timer data files be installed?
Select the folder in which Setup should install the data files, then click Next.
\\Server\Docs\TMBills\RTG Bills
Browse...

9. Uncheck RTG Timer (unless you installed and are using RTG Timer)


Setup - RTG Bills and RTG Timer
Select Components
Which components should be installed?
Select the components you want to install; clear the components you do not want to install. Click Next when you are ready to continue.
NOTE: For network installation, install RTG Bills or RTG Timer but not both at once. RTG Timer must be installed in a separate folder for each user.
RTG Bills 6.0 MB
RTG Timer 1.1 MB

10. Accept the Start Menu Folder


Setup - RTG Bills and RTG Timer
Select Start Menu Folder
Where should Setup place the program's shortcuts?
Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse.
RTG Bills
Browse...

11. Finish installing RTG Bills by going through the remaining windows.

To setup RTG Bills on the workstation:

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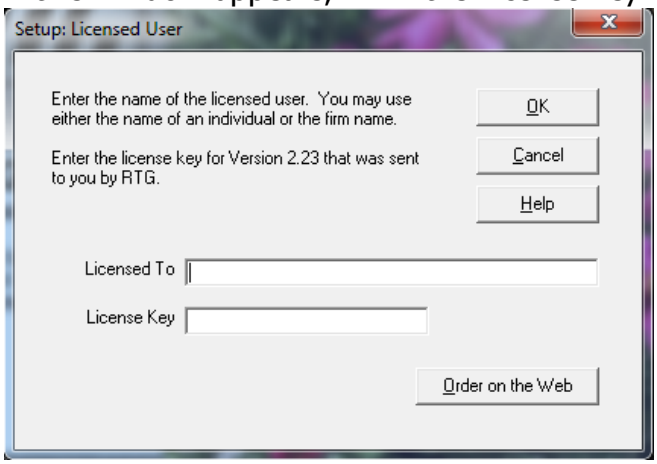
1. Open RTG Bills from the icon on the Windows desktop or from the Start Menu. (For Windows 7, right-click and select Run as Administrator.)
2. Go to:
   Main Menu | File | Update | Yes | Check The Internet For Upgrades
   Check all the items.
   Press: Install
3. If this window appears, fill in the License Key. Press OK.


Setup: Licensed User
Enter the name of the licensed user. You may use either the name of an individual or the firm name.
Enter the license key for Version 2.23 that was sent to you by RTG.
OK
Cancel
Help
Licensed To
License Key
Order on the Web

   Otherwise, go to Main Menu | Setup | Licensed User. Fill in your firm name and License Key.

4. File | Update | Yes | Check The Internet For Upgrades
   Check all the items.
   Press: Install

   Note: Some updates may require that run through Step 4 twice. Simply click Check The Internet For Upgrades again and press Install again.

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3 Learning the Basics

3.1 TMBills and RTG Bills

Introduction

TMBills links Time Matters practice management software with RTG Bills timekeeping and billing software. TMBills lets you enter Clients, Matters and Billing records in Time Matters and then send them to RTG Bills.

RTG Bills is a full-featured timekeeping and billing program designed for the needs of law offices. It is not an accounting program, but does track Accounts Receivable, Trust Accounts, and is QuickBooks Friendly.

TMBills and RTG Bills take the place of Billing Matters and are simpler than PCLaw for timekeeping and billing.

Learning TMBills

There is not much to learn!
With TMBills, you to enter Client and Matter records in Time Matters and synchronize them to RTG Bills. You may enter Billing records in Time Matters and send them to RTG Bills or you may enter Billing records directly in RTG Bills if you prefer.

You enter clients and matters in Time Matters in the normal ways.

About all you need to learn to use TMBills is:
- How to add a Case No. when entering a Matter in Time Matters.
- How to click the Trigger button to send Client and Matter information or Billing records to RTG Bills.
- How to use RTG Bills for billing, described below.

You will also want to know how to apply TMBills Updates. That is easy and is explained in: Installation of TMBills Updates

Learning RTG Bills

RTG Bills is your timekeeping and billing program. It comes with extensive learning materials.

You use RTG Bills to:
- Create and preview bills
- Correct and edit bills right in the Preview window
- Print bills (with option to e-mail some or all)

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- Enter payments you receive
- Track receivables and 30-60-90 day aging
- Produce reports from a wide selection
- Keep track of retainers and trust accounts
- Optionally enter time and expenses directly into RTG Bills

Client No. and Case No.

RTG Bills has a **Client No.** for each Client. In RTG Bills, each Client has Cases that are numbered 1, 2, etc. The Clients in Time Matters match the Clients in RTG Bills and the Matters in Time Matters match the Cases in RTG Bills.

Each Client in Time Matters is automatically assigned the Client No. used by RTG Bills. A **Client's first Matter** is assigned **Case No. 1** in the TMBills Area of the Matter form in Time Matters. A Client's second Matter is assigned Case No. 2, and so on. You enter a Case No. by clicking the Trigger button in the Matter Form to lookup the next Case No. See the section, Entering Matter Records, for specific instructions.

For more instructions on RTG Bills, see: Getting Help

3.2 Entering Matter Records

Introduction

This topic explains how to work with the TMBills fields on the Matter Form when you enter a new Matter.

Caution: You must enter Matters in Time Matters. **Do not create new Matters in RTG Bills.** That defeats to purpose of entering and updating information in one place, Time Matters, and having it go to RTG Bills.

See the Time Matters Help system and online training materials for general instructions on how to enter Matters in Time Matters.

The only steps that TMBills adds to entering a new Matter are:
1. Press the Trigger button to **lookup a Case No**.
2. Press the Trigger button to **Update Matters to RTG Bills**

Note: If you have just entered a brand new Client and then enter a Matter for that Client, you can just enter 1 in the Case No. field in the TMBills Area instead of using the Trigger to lookup a Case No. You know that the Case No. has to be 1 since you are entering the very first Matter for a brand new Client. That lets you skip Step 1, above.

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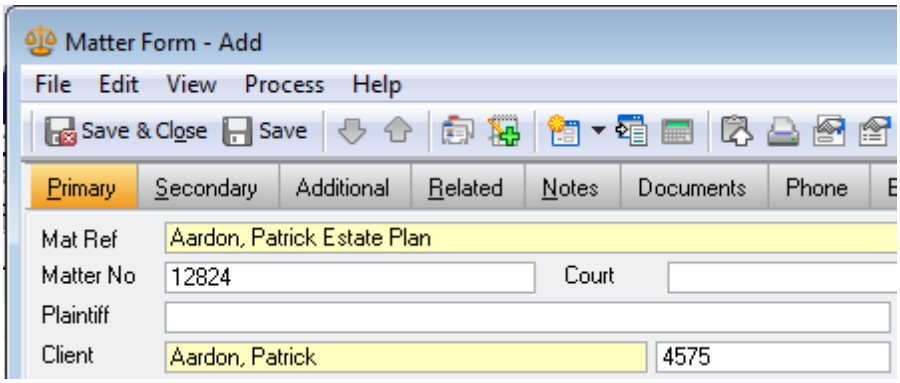
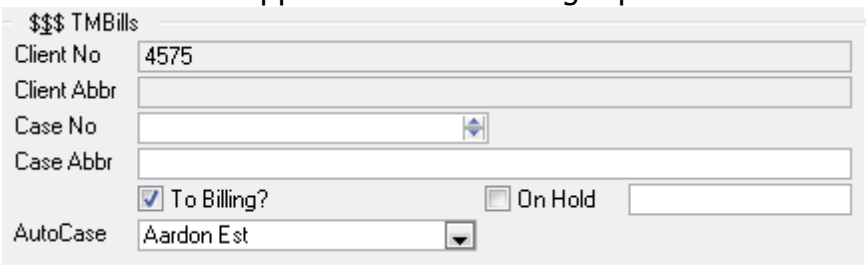
Entering a New Matter

Enter all the basic Matter information and fill in any required fields, including the Client field.



Matter numbers and Client numbers are not required in the top area by TMBills.

The TMBills area appears in the lower right part of the Matter form:

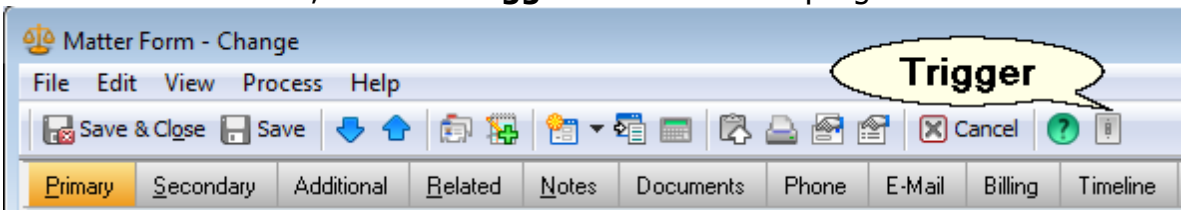


The Client No., To Billing? and AutoCase Name fields are filled in automatically.

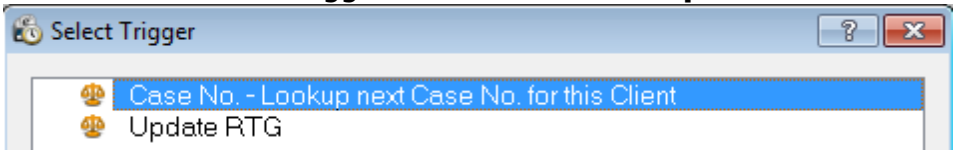
Insert a Case Number

The **Case No. is required** in the TMBills Area, shown above. It links the matters in Time Matters with the corresponding cases in RTG Bills.

To enter the Case No., click the **Trigger** button at the top right of the Matter form:


Matter Form - Change
Trigger
File Edit View Process Help
Save & Close Save
Cancel
Primary Secondary Additional Related Notes Documents Phone E-Mail Billing Timeline

Double-click on the Trigger: **Case No. - Lookup and insert next Case No.**



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Save and Close the Matter, or continue entering information in the Matter.

Warning:

If you manually change the **Case No.**, you may **overwrite** an earlier Case already in RTG Bills. The Case No. Lookup trigger checks for other cases for the same Client and assigns the next higher number.

Optional: Enter a Case Abbreviation

In the above screenshot, the AutoCase field shows a default **Case Abbreviation** for the new Matter. Case Abbreviations are used in RTG Bills to identify each of a Client's cases.

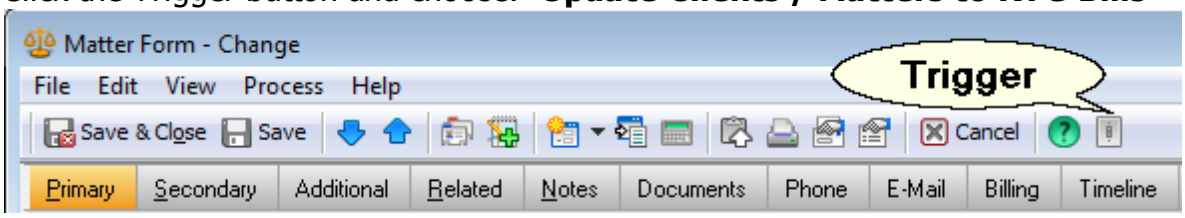
The Case Abbreviation is limited to **10 characters**.

You may want to enter your own, **more descriptive** Case Abbreviation. You don't need the name of the Client in the Case Abbreviation, since the Client name is always shown along with the Case Abbreviation.

You may **enter your own 10-character Case Abbreviation** in the **Case Abbr** field. You may change the Case Abbreviation at any time to make it more descriptive.

Send the Matter to RTG Bills

Click the Trigger button and choose: **Update Clients / Matters to RTG Bills**


Matter Form - Change
File Edit View Process Help
Trigger
Save & Close Save
Cancel
Primary Secondary Additional Related Notes Documents Phone E-Mail Billing Timeline

Note: The Trigger synchronizes **all** new and updated Matters to RTG Bills.

Alternatively, you may use the Trigger button on the Matter list to Update Clients / Matters to RTG Bills.

3.3 Entering Billing Records

Introduction

Three Methods for creating Billing records are:

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1. Enter Billing records in Time Matters and send them to RTG Bills.
2. Create Billing records in Time Matters from other records, such as Event, ToDo, Note, and Document records, and send the Billing records to RTG Bills.
3. Enter records directly in RTG Bills.

There is no "best" way to create Billing records. Choose the method that you prefer.

Method 1 - Entering Billing records in Time Matters is familiar if you previously used Billing Matters. It allows you to create Time records without switch programs. You can save time and effort by with AutoEntry Forms that fill in Descriptions for you

Method 2 - Creating Billing records in Time Matters from other records can save you time and typing if you regularly enter various kinds of Time Matters records, such as Events, Notes, Phone records or Documents. Methods 1 and 2 are compatible. You may enter some records using one method and others using the other. They all go to the same place.

Method 3 - Entering Billing records in RTG Bills is simple and lets you keep a Timekeeping window open and available at all times.

Note: For Methods 1 and 2, there is a limit of 3000 characters (about 500 words or 1.5 typewritten pages) for the Description in a Time Matters Billing record to be Sent to RTG. If you try to send a record with more than 3000 characters, you will receive an error message with instructions. For Method 1, the limit is huge: 36,901 characters or over 7 single-spaced, typewritten pages.

Method 1: Entering Billing Records in Time Matters

You may enter Billing records **in Time Matters** in multiple ways. Perhaps the **simplest way** is to use the Matter List.
To enter a Billing record in Time Matters:
1. Select a Matter on the Matter list (You can start typing a Matter name. Quick Pik will find it for you.)
2. Press the Add Billing button on the Main Toolbar (You may need to add it by right-clicking your Toolbar and choosing Customize.)
3. Fill in the Hours and Description
4. Press the Trigger button on the Form Toolbar.
5. Double-click on **Send Billing to RTG**

If you prefer, you may send Billing records to RTG in batches, skipping steps 4 and 5.

Note: If the Date of Service for a Billing record is different from today, you need to change the **Bill Date** entry from today's date to the earlier date.

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Sending a Billing Records in Batches to RTG Bills

After saving any number of the Billing records in Time Matters:
1. Press the Trigger button on the Billing List toolbar or on a Billing Form toolbar.
2. Double-click on **Send Billing to RTG.**

Note: All unsent TM Billing records are sent to RTG Bills whenever you use any Trigger to Send Billing to RTG Bills.

Method 2: Creating Billing Records from Other Records in Time Matters

To create a Billing Record from another Time Matters record:
1. Complete the other record, e.g. an Event record
2. At the top of the record, click: Process | Send to Billing or click the Send to Billing icon (green arrow)
3. If necessary, edit the Hours and Description
4. Press the Trigger button on the Form Toolbar.
5. Double-click on **Send Billing to RTG**.

Note: You you may wait to **Send Billing to RTG Bills** until after you have enter any number of Billing records in Time Matters. **All** unsent TM Billing records are sent to RTG Bills whenever you use a Trigger to Send Billing to RTG Bills.

Method 3: Entering Billing Records in RTG Bills

You may choose to enter Billing records directly into RTG Bills, but you lose the automation feature in Time Matters that can save you time. To enter Billing records in RTG Bills, you work in the RTG Bills Timekeeping window.

Opening the Timekeeping Window

You only need to do this once at the start of the day.
1. Open RTG Bills
2. Click on Fees
3. Click on List button (Alt-L)
4. Start typing the name of a Client
5. Press Enter when the Client is highlighted. (If the Client has multiple Matters, double-click a Matter.)
6. Press the New button (Alt-N)

Entering a Billing Record

Date, Client and Matter are already filled in. To change the Matter, click List or Recent.

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1. Type in a Description, using Shortcut Codes if you have set them up, e.g. tcw for teleconference with
2. Enter the Hours, e.g. 1.5 or .25 You may also enter as hours:minutes, e.g. 1:30 or :15
3. Press Save

Entering more Billing Records

The Timekeeping window clears when you press Save, but it remembers the Date, Client and Matter. Change them as needed and enter the next Billing records.

3.4 Entering Payments

To enter a payment:
1. Go to RTG Bills Main Menu
2. Press: Payments
3. Press: List
4. **Don't click anything,** just start typing the Client Name and select the Client and Matter.
5. Click: New
6. Change the Date if different from today.
7. Click in Total and enter the amount.
8. Click: Save | Close

4 Standard Tasks

4.1 Closing Matters

Close a matter after work is complete and the final bill has been paid.

Closing a matter hides it from lists and reports in RTG Bills unless you select an option to show closed matters. That keeps closed matters out of your way unless you need to review them.

Deleting a matter is a different task. You should not delete a matter after it is closed since you need to keep billing and payment records for a retention period. Delete a matter only if it has been entered in error. See: Deleting Matters, below.

To close a matter in RTG Bills:
1. Click on Matters, select the Client, then open the Matter.
2. Click on Billing-2 tab.
3. Click the button: Close Matter

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4.2 Flat Fees

The sections below cover how to use RTG Bills to charge a:
- Flat Fee for a **Single Service** or Document
- Flat Fee for an **entire Matter**
- **Monthly** Flat Fee

Flat Fee for a Single Service or Document

To charge a flat fee or fixed fee for a single service or document:
1. Enter a Billing record in Time Matters, including the number of hours worked (although you will not report these on the bill).
2. Send the Billing record to RTG Bills using the Trigger button.
3. Switch to RTG Bills and click the **Fees** button.
4. Select the Matter.
5. Double-click on the Billing record you just sent to RTG Bills.
6. Click on **Fixed Fee** (lower left).
7. Enter the dollar amount in Amount Reported and press Save.

Flat Fee for a Matter

To charge a flat fee for an entire Matter you need to follow some one-time setup steps.

One-time setup for all flat fees:
1. Create a Flat Fee Zero Rates table in RTG Bills:
   Go to: Main Menu | Edit | Rates | New
   Enter the Description: Flat Fee Zero Rate
   Double-click on each timekeeper, leave the rate as 0.00, and press Save.
   Press: Close | Close
2. In RTG Bills, go to: Main Menu | Setup | Other | Firm.
3. Enter a description for the flat fee, such as: Flat fee for legal services
   Note: This Description will appear on the first Bill at the top of the listing of services.

To set up a Flat Fee Matter:
1. Open the Matter in RTG Bills
2. In Billing-1 tab, choose the Flat Fee Zero Rates table.
3. In Billing-2 tab, under Minimum/Maximum Fee choose: This is the minimum fee.
4. Enter the dollar amount of the Flat Fee in Minimum Fee Amount.
5. Save the Matter. Click Yes when prompted to create a minimum fee record.
   A Billing record is created with today's date, the Description from the One-time setup, above, and the dollar amount of the Minimum Fee.
   Note: You may change the date, Description or amount now or at any time before you print the first Bill.

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Monthly Flat Fee

Charging a flat fee every month is known as a recurring charge. You can set up a Recurring Charge in RTG Bills.

To set up a Flat Fee per Month:
1. Go to RTG Bills
2. Click Fees and select the Matter.
3. Click New.
4. Select Fixed (lower left).
5. Check: Repeat (lower right). Note that Monthly is selected. (Other options are Quarterly, Twice a Year and Yearly).

For more detailed information on Recurring Charges, see that section in RTG Bills Help.

Check Repeat. From the list that appears, choose Quarterly. Click Save to save this transaction.

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4.3 Retainers

When a client pays a retainer, you need to set up the Matter to handle the retainer. RTG Bills has a clear online slideshow that explains how to set up and accept retainers. Retainer accounts are used to handle both prepaid fees and Trust Accounts.

To handle a retainer:
1. Create a Retainer Account for the client's Matter.
2. Enter a Retainer transaction.

These tasks are explained in RTG Bills online slideshow:
http://www.rtgsoftware.com/slides/retainer.htm#SLIDE1

The RTG Bills Help system also explains these tasks:
Go to: RTG Bills Help | Contents | Other Topics | Retainers and a Trust Account

Bank Accounts and Trust Funds

If you have one Trust Account and if you hold all prepayments in your Trust Account, you **do not** need to be concerned with Groups. All of your retainers and trust account funds go into your single Trust Account at your bank. The Retainer reports in RTG Bills show you the transactions and balance in your Trust Account.

However, if you have a Trust Account and also receive some prepayments or retainers that **do not go into Trust**, then you use **Groups** in RTG Bills to keeps your Trust Fund and prepayments or retainers separate.

Groups for Trust Accounts and Retainers

If you need to keep Trust Account funds separate from other prepayments, then use the Groups feature in RTG Bills.

Create Group 1 as your Trust Account. Create Group 2 for prepayments and retainers that do not go into your Trust Account.

When create a Retainer Account for a Matter in which you receive Trust Funds:
1. Enter "Trust" in the Description field.
2. Enter 1 in the Group field.

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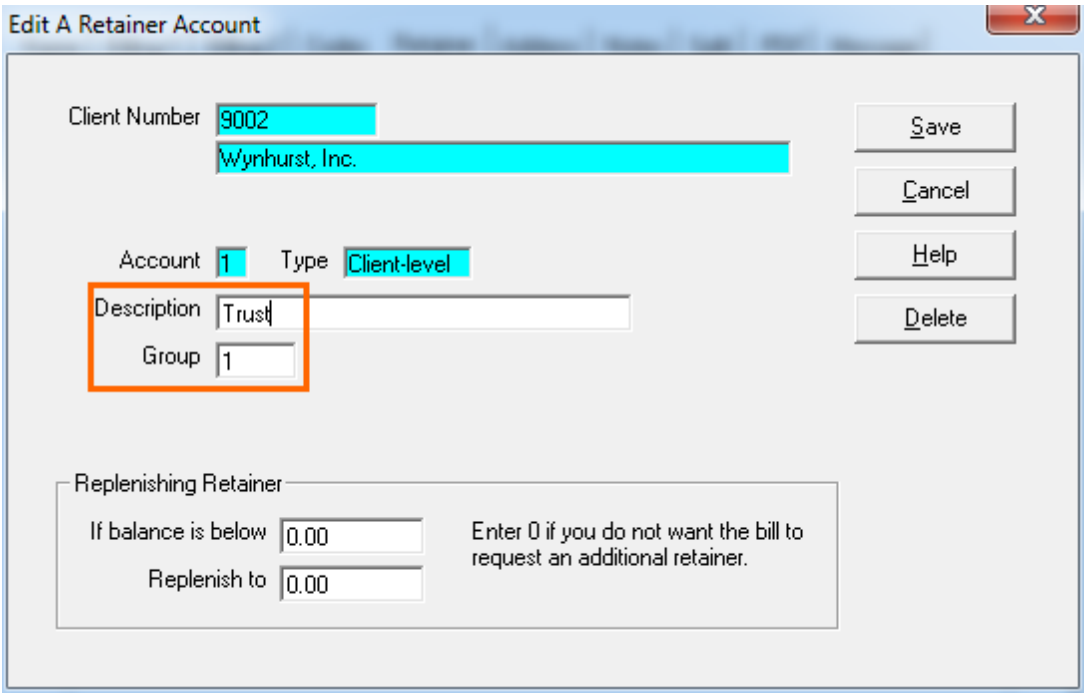

When you create a Retainer Account for a Matter on which you will accept a prepayment that **does not** go into your Trust Fund:
1. Enter "Prepayment" in the Description field.
2. Enter 2 in the Group field

Retainer and Trust Account Reports

A number of reports are available for tracking information on retainers and trust accounts:
- Retainer Ledger - All transactions and balances grouped by account
- Retainer Account Summary - Clients, Matters, and Retainer Balances with Total
- Retainers Applied Automatically - After creating bills, run this report to show what to transfer out of the Trust account.
- Retainers Used and Received - Retainer transactions listed in date order

When you use Groups to separate Trust Funds from prepayments and retainers, the Retainer Reports give separate totals for each Group.

After creating Bills, run the report, Retainers Applied Automatically, to see how much money to transfer from your Trust Account into your firm's bank account. When you use Group 1 for Trust Funds, the Group 1 total is the amount you need to transfer.

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4.4 Trust Accounts

RTG Bills handles both retainer accounts and a trust accounts using its Retainers feature. To handle funds held in trust for a client, set up a Retainer account according to the instructions in RTG Bills Help. These steps are illustrated in an online slideshow:
http://www.rtgsoftware.com/slides/retainer.htm#SLIDE1

For help, go to: RTG Bills Help | Contents | Other Topics | Retainers and a Trust Account

Also see the section in this manual: Retainers

5 Advanced RTG Bills Features

An extensive set of instructional materials is available for RTG Bills. You will find detailed information and step-by-step instructions in the **RTG Bills Help system**. Just click the Help button on the RTG Bills Main Menu or any Help button in the program.

Additional detailed instructions are available online at:
RTG Software site map
RTG Bills Knowledge Base
RTG Bills Slide Shows

This section on Advanced RTG Bills Features supplements the material available from RTG Software.

5.1 Finding Information

Search for a Client or Matter

You may search for a word or part of a word in any Client or Matter record. To search:
1. Click on the Matters button.
2. Click on the Search button.
3. Enter a word or part of a word.

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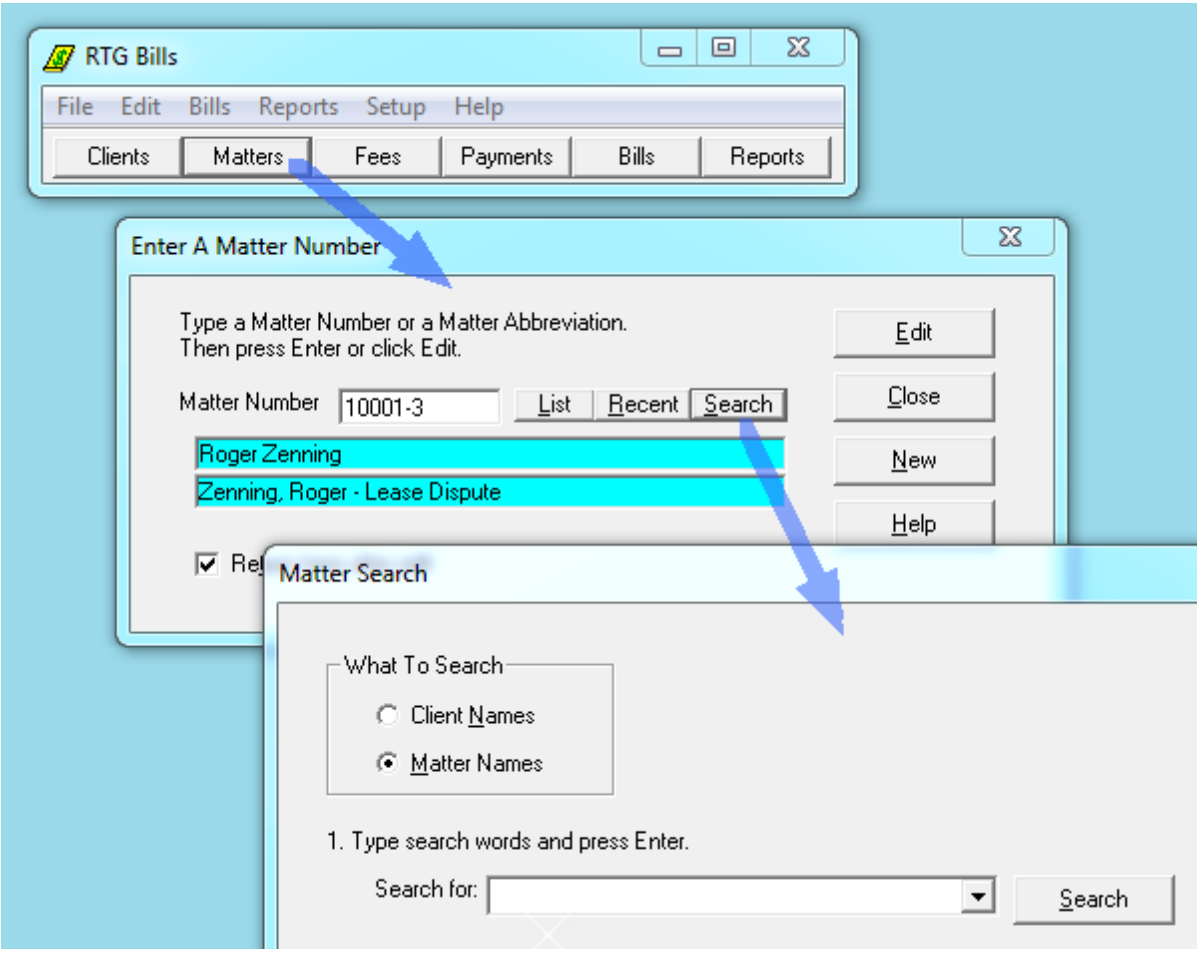

5.2 E-mail Invoices

You may configure RTG Bills to send out Invoices to selected clients as PDF files via e-mail.

RTG Bills can send out E-mails with PDF Invoices automatically or it can create PDF files that you manually attach to E-mails that you create with your E-mail program.

Setup E-mail

For instructions on configuring RTG Bills to send Invoices via e-mail automatically, go to:
RTG Bills | Help | Contents | Menus and Buttons | Setup Menu | Email

To setup E-mail, you will need the settings from your E-mail program, including the server names, username and password so that RTG Bills can send E-mails over the Internet.

Set a Matter to Send PDF Invoices

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To set a Matter to send PDF Invoices, first Edit a Matter:
- Press Matters | List button | Start typing the Client | Press Enter | Choose the Matter

At the Edit a Matter window:
1. Click the PDF tab
2. Check: Reprint Bills as PDF Files
3. Check the box: Send Bills Automatically
4. On the Address tab, fill in the E-mail address of the person to receive the Invoice. You may leave it blank if an E-mail address has been entered for the Client in the Edit a Client window (Main Menu | Clients | Select the Client | Fill in the E-mail field)

If you check Send Bills Automatically, RTG Bills **gives you the option each time** you send out Invoices to E-mail them individually or in batches.

Sending PDF Invoices via E-mail

It takes several steps to send a PDF Invoice or a batch of PDF Invoices via E-mail. At the end, you have the option to cancel sending by clicking No.

To send PDF Invoices via e-mail:
1. Print the Invoices in order to finalize them as you would for paper Invoices. (You may print them to paper or save paper by selecting a PDF printer driver to save paper.)
2. Go to: Main Menu | Bills | Reprint as PDF...
3. Choose All Matters or **One Matter**. If you choose All Matters, select the cut-off date for the batch of Invoices you want send.
4. Click **Print**
5. Press **Yes** at the window: Send 1 message? (Or "Send x messages?" for multiple Invoices)

6 Updates and Upgrades

Updates are minor releases that add features and fix bugs. Upgrades are major releases that add important features or add compatibility with new releases of other software.

IMPORTANT: Before updating or upgrading TMBills, RTG Bills, or Time Matters, please check the TMBills Updates page, http://www.activepractice.com/tmbills-updates. These programs work together. Updating one of them typically requires the latest updates for the others.

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6.1 Updates and Upgrades Policy

TMBills from Active Practice includes RTG Bills from RTG Software. TMBills connects Time Matters practice management software to RTG Bills time and billing software.

IMPORTANT: Before updating or upgrading TMBills, RTG Bills, or Time Matters, please check the TMBills Updates page, http://www.activepractice.com/tmbills-updates. These programs work together. Updating one of them typically requires the latest updates for the others.

Updates for the current version are made available for free as user-installed downloads. Upgrade Protection, $60 per year for unlimited users, covers any upgrades of TMBills and RTG Bills released during a 12-month period. Without Upgrade Protection, upgrades are available at a discount off the new price of TMBills and RTG Bills software. Technical Support via e-mail is included with Upgrade Protection.

6.2 Downloads

TMBills updates and upgrades are available here:
http://www.activepractice.com/tmbills-updates

RTG Bills updates are available directly from within the RTG Bills program:
RTG Bills Menu | File | Upgrade (or Update)
Updates have a **different letter** in the version, such as 2.23c.

RTG Bills upgrades are available from the RTG Software website:
http://www.rtgsoftware.com/dlupg.htm
Upgrades change to a **different number**, such as from 2.23x to 2.24.

If it is **over one year** since you purchased TMBills, you need a **new license key** for a new version of RTG Bills. See the RTG Bills Upgrades instructions, below. To obtain an **RTG Bills License Key** from Active Practice before you download an RTG Bills **upgrade,**
Contact us at: support@activepractice.com or 800.575.0007

6.3 Installation of TMBills Updates

TMBills updates and upgrades are available here:
http://www.activepractice.com/tmbills-updates

Please download the latest update of TMBills.exe and the TMBills setup file, setuptmb.exe from our TMBills Updates webpage.

Save the files in your TMBills folder on your server or main computer, replacing the old files. The folder will end in TMBills (or, for some customers, in RTG). For

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example:
T:\Clients\TMBills
or
\\SERVER1\Docs\TMBills

Installing a TMBills Update

To install a TMBills update:
1. On each user's computer, go to the TMBills folder on the server or main computer, for example, T:\Clients\TMBills
2. Double-click on setuptmb.exe

6.4 Installation of RTG Updates

RTG Bills Updates have a **different letter** in the version, such as 2.23c.

Be sure you are on the latest update to TMBills before updating RTG Bills. Check the TMBills Updates page, http://www.activepractice.com/tmbills-updates.

Updates to RTG Bills may be installed automatically from the Main Menu in RTG Bills. Be sure to update each computer that is running RTG Bills.

To install an RTG Bills update:
1. Go to RTG Bills Menu | File | Update
2. Click: Check The Internet For Updates
3. Check the box(es) for:
   a. Current RTG Bills update (new letter)
   b. Each item that has the word, "Import"
   c. Any FIX or CRITICAL Update
4. Click Install
5. Click: Close, Close

6.5 Installation of RTG Upgrades

RTG Bills Upgrades change to a **different number**, such as from 2.23c to 2.24. Please install the **current version of TMBills** before upgrading RTG Bills.

RTG Bills upgrades are available from the RTG Software website:
http://www.rtgsoftware.com/dlupg.htm

Important RTG Bills Upgrade Installation Notes:

1. If it is **over one year** since you purchased TMBills, you need a **new license key** to upgrade to a new version of RTG Bills. If you have Upgrade Protection from us, please **call us for a new code**. Allow two business days to receive your code. Or

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you may purchase a new license key for $20 (price subject to change) directly from RTG Software at: http://www.rtgsoftware.com/orderupg.htm
2. In the instructions, below, be sure that at the **Select Data Location** window you delete the folder name and enter the correct folder for your RTG Bills database.
3. At the **Select Components** window showing checkboxes for RTG Bills and RTG Timer, we recommend you **uncheck** RTG Timer and leave RTG Bills checked. Most of our customers do not use RTG Timer. Most enter time and expenses from within Time Matters or simply use the Fees button in RTG Bills. (Note: If you already have RTG Timer installed, please check the box for RTG Timer.)

Installing an RTG Upgrade

We will be happy to install the upgrade for you at our current Support Incident pricing. Please call us at 800.575.0007 or e-mail us at: support@activepractice.com

Free e-mail support for RTG Bills is available directly from RTG Software at: support@rtgsoftware.com

To install an RTG Bills upgrade yourself:
1. Install the current update for TMBills. See the previous section in this manual.
2. If it is over one year since you purchased TMBills, request a RTG Bills License Key from us. Contact us at: support@activepractice.com or 800.575.0007
3. Download the upgrade from: http://www.rtgsoftware.com/dlupg.htm
4. Backup RTG Bills: Main Menu | Backup
5. Copy the RTG Bills database location to the Windows Clipboard:
   a. Go to Main Menu | Setup | Database...
   b. Right-click on the folder name and choose: Select All
   c. Right-click again on the folder name and choose: Copy
   (This step saves you time later when you need to enter the the Database Location.)
6. Close RTG Bills on all computers.
7. Carefully follow the instructions on the webpage for installing the RTG Bills upgrade: http://www.rtgsoftware.com/dlupg.htm
8. At the **Select Data Location** window, be sure to delete the folder name and paste the correct folder (copied in 4c, above) or enter the correct folder for your database.

Accept the default program folder.

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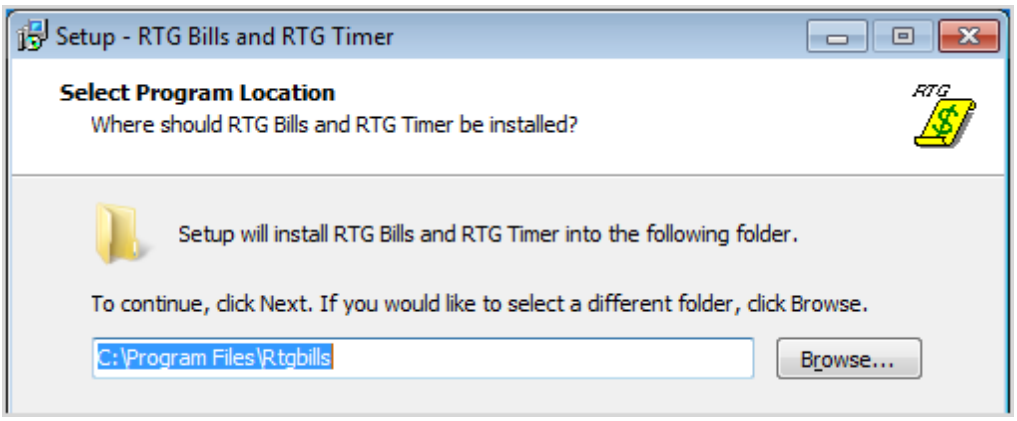
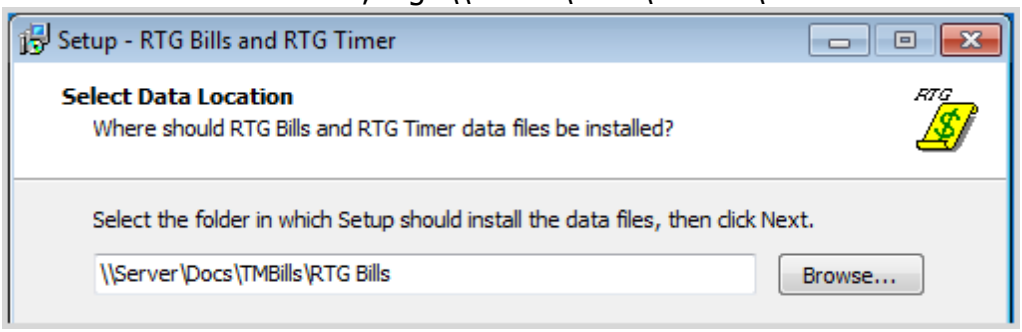
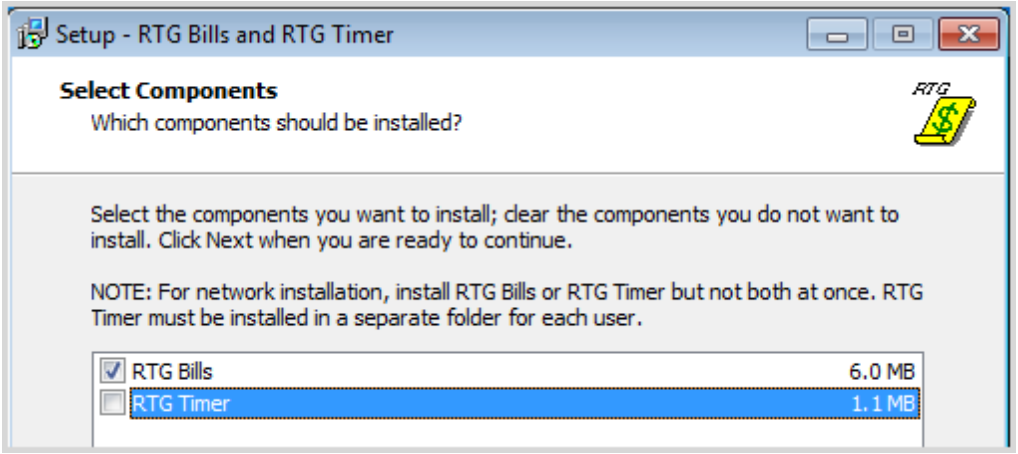

Setup - RTG Bills and RTG Timer
Select Program Location
Where should RTG Bills and RTG Timer be installed?
Setup will install RTG Bills and RTG Timer into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files\Rtgbills
Browse...

Enter the RTG data folder, e.g. \\Server\Docs\TMBills\RTG Bills


Setup - RTG Bills and RTG Timer
Select Data Location
Where should RTG Bills and RTG Timer data files be installed?
Select the folder in which Setup should install the data files, then click Next.
\\Server\Docs\TMBills\RTG Bills
Browse...

Uncheck RTG Timer (unless you installed and are using RTG Timer)


Setup - RTG Bills and RTG Timer
Select Components
Which components should be installed?
Select the components you want to install; clear the components you do not want to install. Click Next when you are ready to continue.
NOTE: For network installation, install RTG Bills or RTG Timer but not both at once. RTG Timer must be installed in a separate folder for each user.
RTG Bills 6.0 MB
RTG Timer 1.1 MB

Accept the Start Menu Folder

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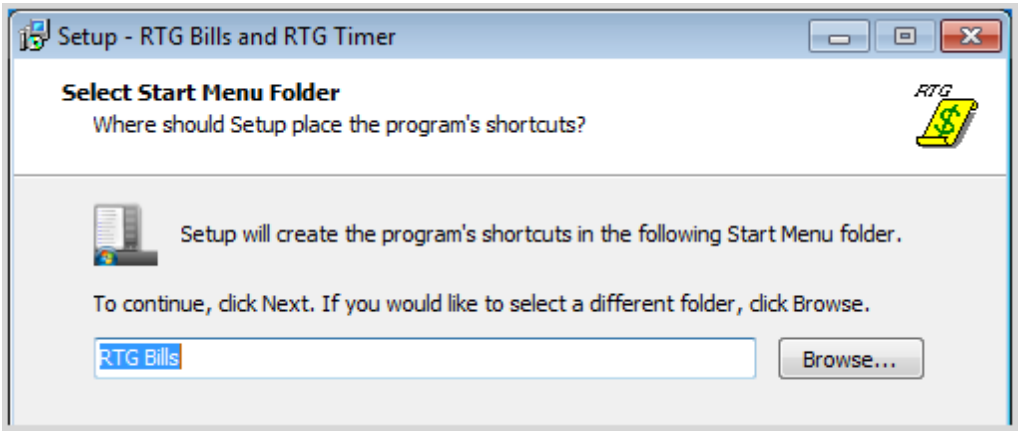
Setup - RTG Bills and RTG Timer
Select Start Menu Folder
Where should Setup place the program's shortcuts?
Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse.
RTG Bills
Browse...

Finish the installation.
Open RTG Bills (For Windows 7, right-click and select Run as Administrator.)
Go to:
File | Update | Yes | Check The Internet For Upgrades
Check all the items.
Press: Install

7 Problems and Solutions

No Client Number in the TMBills Area of a new Matter

You need to fill in the Client field near the top of the Matter form. Do that by clicking in the Client field an pressing the Lookup button to the right of it. Select a Client from the Contact list. TMBills requires that every Matter have a looked-up Client in the Client field.

If the Client field is filled in properly but there is still no Client No. in the TMBills Area (lower right) of the Matter form, the Contact record may not have been linked properly. Click the Lookup button to the right of the Client field and select the correct Contact again. The Client No. should fill in.

Using the Time Matters Wizard for adding Matters is not supported by TMBills. The Wizard does not properly link related information from looked-up records and does not properly complete auto-incremented number fields at this writing (March 2011).

Did not find Client No. -- Error 1143

When looking up a Case No., it is necessary to have the Client No. already filled in. Please see the **No Client Number** problem and solution.

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8 Getting Help

RTG Bills Electronic Help

Complete, step-by-step instructions are included via the Help menu in RTG Bills.

We suggest you first go to: Help | Tutorial.

RTG Bills Web Pages

For **illustrated**, step-by-step instructions on the most common tasks, go to:
http://www.rtgsoftware.com/slides.htm

RTG Bills Help via E-mail

RTG Bills is bundled with TMBills. You receive a full registered license for RTG Bills.

You are entitled to responsive e-mail support directly from RTG Software:
support@rtgsoftware.com
Please be sure you check the RTG Bills Help within the RTG Bills program and online resources before contacting Support.

TMBills Help

TMBills synchronizes client and matter information with RTG Bills. It can also send billing records to RTG Bills.

For any assistance, questions or issues relating to TMBills synchronization, please e-mail:
support@activepractice.com

Updates to TMBills are available on the Web:
http://www.activepractice.com/tmbills-updates

Telephone support is available on a paid basis from Active Practice LLC.
Please call: 800.575.0007.

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Contact Us

Active Practice LLC
5200 Willson Road, Suite 150
Edina, MN 55424-1300
800.575.0007
support@activepractice.com
http://www.activepractice.com

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